

Assistant wealth planner

Proficiency level

New Gen AI skills

Transferrable skills at the same proficiency level

New skills

Transferrable skills at a higher proficiency level¹

Skills Framework track	Product solutioning and management	Job function	Sales and marketing	Job family	Wealth planner
Sub-sectors	Private banking and wealth management	Expected augmentation by Gen AI	Do more and do new: Gen AI can assist in preparing client onboarding materials, and creating pitch books and presentations. Gen AI tools can also generate insights based on client and market data to support market segmentation research, and the Gen AI output can be used directly by both Wealth Planners and the Head of Wealth Planning to augment their capabilities in client management, acquisition, and advisory services		

Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Manage client lifecycle end-to-end	<ul style="list-style-type: none"> Assist in preparing client acceptance and onboarding procedure materials Record client inquiries and ensure they are resolved or escalated Complete documentation required to process required instructions for client Gather client documentation and review for completeness Draft necessary pitchbooks and client presentations corresponding to legal, trust, and other documents
Acquire and manage clients	<ul style="list-style-type: none"> Analyze succession plans and directions provided by senior team members Assist in developing marketing materials for client segments Track wealth planning industry trends and developments

New Gen AI skills

Prompt design	2
Gen AI principles and applications	2
Ethical and responsible Gen AI adoption	2

Additional skills required for potential redesigned role

Role 1: Assistant relationship manager - Private banking (adj. ² Score: 0.53)				
Ethical culture	3	Risk management	3	Account management
Stakeholder management	3	Service challenges	3	Business negotiation
Product advisory	2	Sustainable investment management	3	Natural capital management
Business opportunities development	3	Customer acceptance checking and onboarding	3	Non-financial-industry sustainability developments
Customer experience management	3	Carbon markets and decarbonization strategies management	3	Client investment suitability
Customer relationship management	3	Cybersecurity	3	Sustainability stewardship development
Market specialization	3	Climate change management	3	
Role 2: KYC/Customer due diligence analyst (adj. Score: 0.45)				
Ethical culture	3	Service challenges	3	Taxonomy application
Stakeholder management	3	Data governance	3	Continuous improvement management
Customer acceptance checking and onboarding	2	Regulatory risk assessment	3	Regulatory compliance
Customer relationship management	3	Account management	3	

1. Transferrable skills with an increase in one level of proficiency is considered easier to acquire than transferable skills with multiple levels of increase in proficiency, followed by net new additional skills. Depending on job redesign for the financial institution, the financial institution will have to pick select skills to reskill employees on, via a combination of on-the-job training and existing courses.

2. Skills adjacency score.

Source: SkillsFuture Skills Framework

DO MORE AND DO NEW